



RECORD OF DISCUSSION

TO: Joey Rufo, Office Coordinator

FROM: Jill Mecey, Manager, Organizational Effectiveness and Administration

DATE: **August 28, 2017**

SUBJECT: Follow Up to Written Warning and Performance Improvement Plan (PIP)

As I stated in your Written Warning and PIP, I would review your progress and meet with you one-on-one to discuss your performance. While generally these sessions would only be verbal communications, I am writing down what I want to discuss with you for this meeting to make sure there is no misunderstanding of what we discussed today. I feel there has been some mistrust and hurt feelings since I gave you the Written Warning and PIP, which has hurt our working relationship.

First and foremost, the purpose of the Written Warning and PIP was to make you aware of my concerns about your job performance and to assist you in improving. As your manager, it is my responsibility to raise concerns with you so you understand what is expected of you so you can improve. It was not to "retaliate" against you in any way and I'm sorry that you feel that way. It simply is not true.

As I raised in the Written Warning and PIP, you showed poor judgment when you sent the unauthorized email about travel and discretionary spend. You gave wrong information and assumed the role of an HR leader when that is not your role.

You also showed poor judgment when you took it upon yourself to collect certain EEO data. I understand that you thought Lyn Salvo gave you permission to begin this huge undertaking, but I've spoken with Lyn, and it was not her request that you run the report. She thought you had created charts to track disciplinary actions, which was your assigned job responsibility. Any collection of EEO data is the responsibility of HR and not Administration. Further, if such a task were to be undertaken, it would be done at the direction of Legal and only after seeking advice of counsel on how to properly do an internal audit. As you noted in your email to Lyn Salvo and Gina Petrella, the data you had summarized "isn't very informative at the moment because we lack sufficient amounts of data to give this relevancy." Indeed, the data you collected does not provide any insight because the population does not include anyone who did not self-identify their race, the time period is only a one- or two-month look back, there were cases where one event was counted as multiple incidents, the incidents were not segregated between discretionary and non-discretionary discipline, and there was no accounting for any differences in policies and decisionmakers among the three entities you looked at.

Even more troubling is the fact that you accessed EEO data from employees' personnel records without authorization and apparently stored all of this information on your computer and back up drive. As you know, personnel records are confidential and you are to only access information that you have a legitimate business need to know. In this case, that was simply to look at disciplinary records and nothing else. As for confidentiality, it is important that you maintain the confidentiality of all HR and other company records, and to not share such information with anyone (whether inside or outside the company) who do not have a legitimate business need to know the information.

As an FYI, even before you had started collecting the EEO data, HR had already planned to conduct another EEO training program to its managers to address potential biases, whether intentional or subconscious. This new training program is being created with a rollout date targeted for October 2017.

As for your communication with me as your manager, the issue I had was not that you verbally applied for the HR Manager position and sought out the Sr. Director of HR and discussed it with the VP of SGS, rather it was the fact that you told me you were not looking to move out of the Office Coordinator role for at least a year and then you turned around and verbally applied for another position. I believed you when you said you wanted to stay in the Office Coordinator role so that I would take the time to train you and help you grow in this position. Your about-face as to your intentions



surprised me and could lead me to mistrust what you tell me and to question your motives in the future. In order for us to be able to work together effectively, I need to be able to trust you when you tell me something. To be clear, I am not prohibiting you from applying for other positions or talking to others about your desire to move to another job. My only reason for counseling you on your communications with me was your apparent dishonesty to me.

Saying all of this, I do want to work with you to improve our working relationship. I know you want to learn and grow in your role as Office Coordinator, and I am committed to helping you do that. I hope you will commit to using good judgment/decision-making when performing your assigned duties, and to communicate with me honestly going forward. Finally, if you are interested in learning new skills or seeking additional responsibilities as Office Coordinator, talk to me about it. I do want you to feel valued as an employee, and to be able to come to me with any questions or concerns.

If you have any questions about what we discussed today, please let me know.